GM Lead Users Group

Date:	May 11, 2005, Wednesday
Time:	9:00–11:00 a.m.
Location:	6101 Executive Building, 2nd Floor Conference Room
Advocates:	Michael Loewe and Pamela Mayer
Next Meeting:	Wednesday, June 08, 9:00 a.m.-11:00 a.m. Atrium Building, 6101 Executive Blvd, 2nd Floor Conference Room.

Action Items

1. (Group) Anyone having an issue with the Client Server terms award issue or the J2EE fiscal year switch should contact Cathy Walker immediately.

2. (Cathy Walker) Follow up on the following problems: the Client Server terms award issue and the record fiscal year switch within J2EE.

3. **(Cathy Walker) Investigate the training grants import problem in J2EE.**

4. (Group) Send Cathy Walker any additions, suggestions, questions or comments concerning the eNotification Event priority list.

Documents

1. GM Lead Users Survey

2. eNotification Events Document

3. Element Name/Description/Data Document

General Points

Eddie stated that the eRA wanted to remind all Grants Management users that closeout grants should be put in the Grants Closeout Module (GCM) the moment that they terminate and not after the 90 day waiting period. It is overdue when entered after 90 days. Submitting these grants immediately after closeout allows workers within the Commons system to act without delay.

Eddie also reminded the group that this is the time of year where there are a lot of red bars within the Office of Research Integrity (ORI). The annual reports put out by ORI are due March 31st. He said that if there are any red bars right now, it is most likely the fault of the grantee. It would be proactive for members to remind grantees about these reports and that they need to be on time with their applications.

GMAC Picnic Info

Eddie said that the $5.00 dues for the picnic this year should have been paid by those who plan to attend the event. He commented that good food and good times were had by all last year and that he was looking forward to more of the same this year. He said that the food this year would be

chicken and ribs again. The poster event at this year's picnic will be less of a competition and more of a display. Each poster must have somewhere on it the mission, a list of awardees, and a list of accomplished goals from last year. Poster templates in PowerPoint will be forwarded to interested parties. While this might take away from the creativity of the poster event, it will serve to help achieve the desired visual. Creativity, however, is by no means banned.

Eddie also told the group that the Dunk Tank would be making a return appearance at the picnic this year.

Survey Summary

Eddie said that they received 18 GM Lead Users Surveys, which he emailed and handed out last month. This document is a general summary of the responses. He went over the responses with the group.

When discussion turned to future systems and modules, Cathy Walker said that June will be the time to show the updates on the GM Redesign. She also stated that Program, Commons, WebtQT, Checklist and the redesign are fairly easy to present, so users should see them soon. The redesign has taken longer than expected because it deals with a grand functionality change (including a customizable multiple checklist), but a demonstration of its first iteration will take place soon. There are currently complicating factors disabling a wide release, but Cathy has been trying to send demos out to select users for feedback. The redesign will increase communication between Program and Grants Management in a later release.

Mike Loewe stated that there needs to be more verbal feedback and responsibility taken by the members of GM to get people to come to the meetings. One way to draw people to the meetings is to have a timelier release of the agenda. This will not only prepare existing members for meetings, but will also give potential attendees a heads-up as to what goes on in Grants Management every month.

eCGAP Update

Eddie stated that the update of the electronic Competing Grants Application Process (eCGAP) is underway. In the "Cool Tools" report under Systems Query on the Cool Tools page, there are 42 submitted competing applications that are all going to the October council. While will all eventually go on the 424RR electronic form, they currently exist on the 398 form. Right now, there are issues with how SRAs provide e-applications to reviewers – be it via CD or through some other medium. They are also experiencing some Conflict of Interest (COI) issues. There should be a pilot for the Commons working group using Grants.gov released this month. They are using dead data to test this process right now. The receipt of the aforementioned 42 applications went smoothly and that number should increase significantly by next fiscal year.

Currently, there are two ways to submit applications electronically: by using the Electronic Streamlined Non-Competing Award Process (eSNAP) or by submitting applications from system-to-system. Some grantees even buy or create their own system which interfaces with that of Grants Management. The Notice of Grant Award can be sent back in the system-to-system feature. This electronic data return is another area dealt with by the GM Redesign.

Status of GM J2EE

Cathy Walker began the GM J2EE status discussion by asking for feedback from the group about not only J2EE, but also Client Server. The *terms* problem still occurs within Client Server on a daily, if not hourly basis. It still occurs randomly, but Cathy stated that she has heard less incident of it happening. The web version can still be used to get the award out. Usually the fix occurs on its own the next day. To take care of this problem, she proposed that they bring in a contractor to come in for a few days for the sole purpose of solving this issue. She then asked for volunteers from one or multiple ICs to work with both the helpdesk and the contractor. If this issue is not addressed and a fix is not found by the end of the fiscal year, there will be more problems. Users are also still experiencing slowness in both the J2EE and Client Server when they try to access the release page. Sometimes the menus even disappear when users view the release page.

There are two major bugs that potentially cause these problems in the J2EE version. The first bug concerns the Agency for Healthcare Research and Quality (AHRQ) preview Notice of Grant Award (NGA), which pulls the NIH award and AHRQ's. The award that is stored in the system and emailed is fine, but those that are printed and sent via regular mail are incorrect. The NGA stored in the Grant Folder should be okay, so users can use that as a workaround.

The second bug mistakenly releases *next* year's record when there are revisions on the review page. Cathy said that this issue has happened in production about five times, and they have been unable to reproduce it in test, stage or production. When users switch from the awards page to the release page, it freezes and they have to change over from J2EE to Client Server. If there is a transfer situation (changing a Type 5 to a Type 3, for instance), then this can get even more confusing. Since there has not been a WIP on these records yet, no money is encumbered; however, if there is a WIP on the future record then it will be released and cause many more problems. They are looking at preventing that whip recognition by showing the system there is no Grants Management Officer (GMO) signoff. Cathy asked that anyone experiencing these problems contact her before they complete the awards.

Action: (Group) Anyone having an issue with the Client Server terms award issue or the J2EE fiscal year switch should contact Cathy Walker immediately.

Action: (Cathy Walker) Follow up on the following problems: the Client Server terms award issue and the record fiscal year switch within J2EE.

Cathy asked the group whether or not they should go through the fiscal year with Client Server, complete with the terms problem, or if they should attempt something else, like going through the year with J2EE, which also has bugs. She suggested going through with the former option and using the GM redesign as a backup, since it will be completed later in the year. If they chose this route, there would be no enhancements or bug fixes until the switch to the redesign takes place. Because of the maintenance and testing cycles, there is a timeframe issue where fixing any bugs or major issues would be a two month process. This would come out at the same time as the redesign and would thus be pointless. Kalpesh Patel, architect of the redesign, suggested that users utilize the J2EE version as much as possible.

A few ICs use J2EE as their main version. There is another problem where training grants are not displayed properly, requiring a lot of user manipulation. Cathy asked users to send this problem to her so that she can look at it.

Action: (Cathy Walker) Investigate the training grants import problem in J2EE.

> *Q. Is there a set date when Client Server is no longer available?*

> *A. Cathy stated that it would no longer be available in October, but some group members suggested that it just be turned off so that users get used to not having it available. If they shut it off as early as June 1ˢᵗ, users could still use the web version and if there are any problems then they can turn it back on. Right now, they are holding up a few other important deployments involving animal subject coding changes, such as Internet Assisted Review (IAR).*

After further discussion, the group came to the <u>final</u> conclusion to turn off Client Server as soon as possible (June 1ˢᵗ) and to use the web version until the redesign is put into action. The Client Server will be used as a backup and turned on only if J2EE fails.

Pam Mayer briefly addressed the issue concerning report passwords not working by telling the group that members should use only the following non-alphabetical characters: $, ! or =.

The conversation was brought back to the redesign. Cathy told the group that while it may not be radically different from what the users are currently used to, there are still some changes worth noting. While it was Cathy's initial plan to go through the redesign next month, Pam and the group wished to briefly review the current redesign user interface. Cathy directed everyone to the new page, found at http://erawebdev.od.nih.gov/ui and by clicking the *Grants Management* tab, and went over the redesign page.

eNotifications for First Release of Redesign

My Events

Cathy went over the *eNotifications My Events* document. She stated that eventually there will be a single sign-on for Grants Management. This functionality, however, will not be ready for the first release. Since they are trying to get away from email notifications, there will be a page containing notifications particular to that user. Because of time constraints, Cathy stated that they would not be able to explore this document in detail and asked that group members send any suggestions, questions or comments to her.

The first six, grayed-out rows on the form are the notifications associated with the workflow, built into GM. Through these events, grantees will be able to electronically submit information such as administrative supplements and change request of PI and/or institution. These are long-term items that will be included in the second or third release. Cathy asked that the group decide the priority of the rest of the events on the documents, which are more immediate.

> *Q. Is there a way to change from email notification?*

> *A. Eventually, there will be an option to either receive or reject email notifications.*

After briefly going over the different events, Cathy noted that she marked the following options with a high priority: 9, 11, 17 and 21. She then asked if there were three to four others that should be given a high priority. She requested feedback from group members by next week.

Action Item: (Group) Send Cathy Walker any additions, suggestions, questions or comments concerning the eNotification Event priority list.

Cathy's Top Four Highest Priority Events

Cathy again asked that the users look at and comment on the list of expanded information (including sample email text) on what she considers the top four, highest priority eNotifications. She also asked users to decide whether they want individual or cumulative email notification. She hopes to finalize this list with member feedback by the end of next week.

Open Discussion

Mike Loewe stated that there are some data issues within data closeout where some applications should not be there. He asked that group members make sure that entered data is clean before it goes into the system. There was a "How To" email that addressed this issue sent to the Grants Management Officers (GMO), and if anyone is having any issues, it would be best to speak with them.